Microsoft Whiteboard Help

Whiteboard

What can I do with Whiteboard?

Microsoft Whiteboard is a freeform, digital canvas where people, content, and ideas come together. You can use Whiteboard for collaborating with your team to accomplish many activities — whether your team is in the same place or in multiple locations. Team members can work collaboratively using their own devices.

Activities include:

- Running effective meetings
- Brainstorming
- Team sprint planning
- Project planning
- Problem solving
- Incident management

To learn more, visit the Microsoft Whiteboard site, or search for the Whiteboard app in the Microsoft Store on Windows 10, and on the App Store for iPhone and iPad.

How do I start using Whiteboard on my PC?

- You can install the Microsoft Whiteboard app for Windows 10 from the Microsoft Store.

After installing, sign in to Whiteboard with a free Microsoft account (Outlook, Hotmail, Live, Xbox, etc.) or Office 365 account (personal, work, or school).

How do I start using Whiteboard on my iOS device?

- Download Microsoft Whiteboard to your iOS device from the App Store (requires Apple iOS 9 or later, iPhone 5s or later, iPad Mini 3 or later, iPad Air, or iPad Pro).

  After installing, sign in to Whiteboard with a free Microsoft account (Outlook, Hotmail, Live, Xbox, etc.) or Office 365 account (personal, work, or school).

How do I start using Whiteboard for the web?

- For commercial users, Whiteboard for the web is rolling out to all users. Once enabled, you can access Whiteboard for the web at https://whiteboard.microsoft.com.
- Whiteboard for the web currently allows users to create and join boards, create and erase ink, and view sticky notes and images that others have added. It is supported on devices running an up-to-date version of most browsers — including Edge, Chrome, Firefox, and Safari.

  Note: To zoom the canvas on Edge using a touch screen, touch events must be enabled. To do this, type about:flags in the address bar and press Enter. Scroll to **Enable touch events** and select **Always on** in the drop-down.

How do I use Whiteboard on my Surface Hub?

- You can launch the Microsoft Whiteboard app by tapping the Whiteboard icon on the Start Screen. You can immediately begin inking with the pen, adding images or sticky notes, and signing in to collaborate with colleagues.

To learn more, see Use Microsoft Whiteboard on a Surface Hub.

What account do I need to use Whiteboard?

- To use Microsoft Whiteboard on Windows 10 or on iOS, you must sign in with a free Microsoft account(Outlook, Hotmail, Live, Xbox, etc.) or Office 365 account (personal, work, or school).
- To use the Whiteboard for the web, you must sign in with an Office 365 account (work or school).

I'm an Office 365 IT Administrator. How do I enable or disable Whiteboard for my organization?

- Whiteboard for Windows 10, iOS and web is automatically enabled for your organization. Your users are able to sign in to the Whiteboard app on those devices. To change this, see Enable Microsoft Whiteboard for your organization.

What are the feature differences between Whiteboard for Windows 10, iOS, and web?

- The Whiteboard apps on Windows 10 and on iOS provide comparable levels of functionality, with some small differences.

  For example, in the iOS app, Bing image search is not available, and you cannot ink to invite participants (you must type people's names with the keyboard).

  The Whiteboard for the web currently allows users to create and join boards, create and erase ink, and view sticky notes and images that others have added.

- Our goal is to more closely match the feature sets of the Whiteboard apps across platforms over time.

What devices are supported?

- The Whiteboard app for Windows 10 is supported on all devices running Windows 10, including Surface Hub.
- The Whiteboard app for iOS is supported on Apple iOS 9 or later, and requires iPhone 5s or later, iPad Mini 3 or later, iPad Air, or iPad Pro.
- Whiteboard for the web is supported on devices running an up-to-date version of most browsers — including Edge, Chrome, Firefox, and Safari.

Note: Whiteboard for the web is currently incompatible with Internet Explorer, Windows Phone 8.1, the Silk browser on Amazon Kindle, and extremely small form factor devices (such as smart watches).

How do I sign in to Whiteboard?

- Tap the **Sign in** button in the upper right corner and then sign in. As soon as you're signed in, you can access additional features, such as persistent whiteboards and collaboration with others.

I can't sign in. What should I do?

- If you are using your Office 365 organizational account, contact your Administrator to ensure that the new Whiteboard service is enabled for your organization.
- If you are experiencing this issue on a Surface Hub, contact your Administrator for more information or see the Microsoft Surface Hub admin guide for settings that can prevent signing in.
- If you are using your Office 365 corporate account on an iOS device and your account has any tenant-level conditional access policies or MDM requirements, please ensure you have the Microsoft Authenticator app installed.

How do I use Templates (Preview) in Whiteboard?

Templates are a new feature, currently in Preview, and available in the PC, Surface Hub, and iOS apps. Templates let you and others brainstorm and work together more easily in Whiteboard.

Templates can be accessed by tapping or clicking the **Insert** button. This will bring up the template gallery, where you can scroll to browse and choose a template.

The following templates are available in Preview, with more to be added over time:

- Brainstorming
- Effective meeting
- KANBAN sprint planning
- SWOT analysis
- Project planning
- Problem solving
- Project milestones
- Retrospective
- KWL (Know, Wonder, Learn) for Education
- Weekly planner (new)
- Empathy map (new)
- Persona builder (new)

Note: Templates are not yet supported in Whiteboard for the web, but will be available there in the future.

How do I use ink in Whiteboard? What is finger painting?

- If you're using a device with an active pen, you can use pen and touch for different things. Drawing on the screen with the pen will cause ink to appear, while dragging with your fingers will cause the canvas to pan.
- If your device is passive — meaning that the pen is hollow or your device didn't come with any pens — you'll need to toggle finger painting mode on and off to change how you interact with the screen. While finger painting mode is on, touching the screen will draw ink on the canvas. While finger painting mode is off, touching the screen will pan or zoom the canvas.

- You can switch among different color pens, highlighters, and erasers by selecting the appropriate tool at the bottom of the app.

How do I use a mouse and keyboard in Whiteboard?

Do any of the following:

- To pan the board canvas, click and then drag the canvas with the mouse, or hold down the Ctrl key on your keyboard while using the arrow keys.
- To quickly zoom the board canvas, scroll the mouse wheel up or down (if available).
- To select an object, click it with the mouse, or press the Tab key repeatedly until the object you want is selected.
- To insert an object, such as an image or text, click the **+** icon in the toolbar, and then click the object that you want to add. You can also use the context menu by clicking Shift + F10, using the arrow keys to select the object that you want to add, and then pressing the Enter key.
- To draw or erase ink, click the **Pen** icon on the toolbar, select a pen or an eraser, and then use your mouse to draw on the canvas or to erase ink strokes. To use the keyboard for tool selection, press the Tab key repeatedly until the **Pen** icon is selected on the toolbar.
- To move the ruler while it is visible, click and then drag the ruler with the mouse.
- To change the ruler's angle, click to select the ruler with your mouse, and then use the arrow keys on your keyboard to change the angle.

How do I use the ruler?

The on-screen ruler in Whiteboard can help you draw precise, straight lines or align a set of objects on your whiteboard. To use the ruler, do the following:

1. Tap the **Ruler** icon to make the ruler appear on the canvas.
2. Position the ruler at the angle you want:
   - Use *one finger* or the mouse to move the ruler up/down or left/right.

- Use *two fingers* to rotate the ruler to the angle you want. If you don't have a touch screen, use the mouse to select the ruler and the arrow keys to change the angle.

3. To draw a straight line, tap to select a pen or highlighter, and then begin drawing along the edge of the ruler.

How do I use Ink to Shape?

- If you want your hand-drawn shapes to change to precise shapes, you can use the optional **Ink to Shape** feature by enabling it in **Settings**. When Ink to Shape is active, drawing a shape — such as a circle or square — will automatically change the hand-drawn ink strokes to a precise shape on your whiteboard.

  Whiteboard's shape conversion currently works for squares, rectangles, triangles, circles, hexagons, pentagons, and parallelograms.

  Tip: You can use the **Undo** command if you want to revert to your original ink strokes for the last shape you drew. Shapes cannot be erased, but can be deleted by tapping on the shape and selecting the Trash Can icon from the context menu or using the Delete key. To stop automatically converting shapes from ink, turn off the **Ink to Shape** feature in **Settings**.

How do I use Ink to Table?

- Whiteboard allows you to create organized and clean tables on the fly with just a few ink strokes. You can highlight cells and add or remove columns or rows. To begin a table, first draw a square on the canvas. Once it is recognized by Whiteboard, bisect the shape with a vertical or horizontal line to create columns and rows, respectively.
- You can add or remove columns and rows using the **+** and **–** symbols. Using the highlighter on specific cells also lets you highlight them for easier reference.
- Erasing over a table erases the content in the table *before* it erases the table itself so you won't accidentally erase the table itself.

How do I use object snapping?

Object snapping helps you align your content by providing a visual cue. A line appears when you move an object (such as a sticky note or an image) close to another object.

You can enable object snapping in **Settings**.

How do I select, move, resize, and copy content?

- To move objects, when finger painting mode is disabled, you can select with your finger to easily move around the canvas.
- To select content, you can use your finger or pen — or you can use the **Lasso Select** tool in the toolbar to select several objects at once. With Lasso Select activated, use your pen to circle the content you want to select. When finger painting mode is enabled for passive/non-pen based devices, you can also turn on **Lasso Select** to use your finger to circle-select content.
- If your active pen has a barrel button, hold this button to temporarily switch into **Lasso Select** mode and circle content to select it.
- When content has been selected, move it using your finger or pen. To resize it, use two fingers to stretch or minimize the content. To copy, press and hold the selected content, press the **Copy** button, press and hold in the location where you want to paste, and then press the **Paste** button.

How do I add pictures to Whiteboard from a web browser?

- To copy and paste pictures from a browser or another app, press and hold (on touch devices) or right-click to copy content, and then right-click to paste it.
- See How do I use Bing Search in Whiteboard? and How do I add pictures to Whiteboard from my device? in this article for instructions on how to add images in other ways.

How do I add pictures to Whiteboard from my device?

- To insert pictures from your device, press and hold (on touch devices) or right-click to open the context menu, and then select the **Image** button. The File Explorer will appear, where you can select pictures from your device.

How do I add sticky notes and annotate them?

- Tap the **Insert** button in the toolbar, then tap **Text note**. You can also choose a specific area of the canvas, press and hold (on touch devices) or right-click to open the context menu, and then click the **Note** button to insert a sticky note.
- To annotate a sticky note with ink, write on top of the sticky note and the ink will be grouped with the sticky note. To annotate a sticky note with text, click the sticky note. When the cursor appears, type on your keyboard.

How do I lock an image to the background?

1. On touch devices, press and hold the context menu (or right-click it) to open it, and then tap or click the **Image** button.
2. In the **Open** dialog box that appears, select a picture from your device, and then click **Open**.
3. If necessary, resize the image you inserted by clicking or tapping the image to select it, and then dragging the sizing handle in the bottom right corner of the image up or down.
4. When the image looks the way you want, right-click it, click the **. . .** button on the context menu, and then click **Lock to background**.

Tip: To unlock an image from the background, right-click the image, click the **. . .** button on the context menu, and then click **Unlock from background**.

How do I look at a bird’s eye view of my whiteboard?

- Double tap or click to zoom out so you can view the entire whiteboard. You can double tap or click to toggle between a bird's eye view (zoomed out) and a zoomed in to 100% view.
- Alternately, continuously zooming out the canvas will eventually switch you to bird's eye view.

Where can I find all of my whiteboards and how do I switch between them?

- When you have a whiteboard open, you can click the **Back** arrow get to your other existing whiteboards.

  Note: The back button is not visible on Surface Hub until you sign in.

How do I collaborate with someone else in Whiteboard?

- While signed in, you can tap start a collaborative session by tapping the **Invite** button next to your name and then writing or typing the name of the person you want to collaborate with. This will send them an email and they will see your board automatically appear in their list of boards.
- You can also generate a sharing link that you can copy and paste into Skype or into an email message, by clicking **More options**.

  Note: Users can currently collaborate only with other people within their organization. We will be adding the option to collaborate with guests outside of your organization in the future.

How can I export a whiteboard, or save it as a screenshot or a file?

- To export your whiteboard, tap the **Settings** button, and then select **Export image (png)**.

How do I use Bing Search in Whiteboard?

- Tap the **Insert** button in the toolbar, then tap **Bing image search** to bring up the **Bing Search** dialog. From here, you can write a search term that will return pictures and interactive content that you can place on your whiteboard. Tap the **Insert** button to insert selected content on your whiteboard.

  Note: Within Whiteboard, Bing's SafeSearch filter is set to **Strict**.

  I don't see Bing Search, Sign in, or Sharing options. Is something wrong?

- Administrators have the ability to change the default settings and capabilities of Whiteboard using device management tools like Mobile Device Management (MDM) or Microsoft InTune. Please check with your Administrator about enabling these features or see the Microsoft Surface Hub admin guide for more information about settings that can be configured.

  Note: Bing image search is currently not supported in Whiteboard for iOS.

  How can I export, transfer, or delete personal data from my whiteboards?

  To export:

- Tap the **. . .** button for the whiteboard you want to export, and then select **Export image (png)**.

  This will open a File Explorer window in which you can choose where to save the image.

  To transfer:

- Contact your IT administrator and have them change the ownership of the whiteboard you want to transfer.

  To delete:

- Tap the **. . .** button for the whiteboard you want to delete, and then select **Delete**.

  Warning: This will permanently delete the whiteboard.

What is Whiteboard in Microsoft Teams meetings?

- Whiteboard integration in Microsoft Teams meetings is powered by Whiteboard for the web, which lets participants of Teams meetings draw, sketch, and write together on a shared digital canvas.

  For details about Whiteboard integration with Teams, see Use Whiteboard in Microsoft Teams.

What compliance category does Whiteboard meet?

- The Whiteboard apps for Windows 10, iOS, and web meet Tier C, which means that they conform to global standards including SOC 1, SOC 2, ISO 27001, HIPAA, and EU Model Clauses.

  For more information, visit the Microsoft Trust Center.

I've got a suggestion or I've found a bug. What should I do?

- You can send feedback directly to the Microsoft Whiteboard team by tapping the **Settings** button and choosing **Send Feedback**. This will open the Microsoft Feedback hub, where you can enter information about the issue you've encountered and provide a screenshot.